REPORT TO THE MINISTER OF LABOUR BY THE ONTARIO PAY EQUITY COMMISSION

RESEARCH REPORT I

THE PAY EQUITY COMMISSION

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PAY EQUITY IN PREDOMINANTLY FEMALE ESTABLISHMENTS: RETAIL SECTOR

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THE VIEWS EXPRESSED HEREIN ARE THOSE OF THE AUTHOR AND DO NOT NECESSARILY REFLECT THOSE OF THE GOVERNMENT OF ONTARIO

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INTRODUCTION

This report examines the nature of women's work in predominantly female establishments within the retail sector. Specifically, the following areas are examined -

- Industries in the sector,
- Number of establishments by industry, by size,
- Proportion of female employees and employment within industry divisions by size of establishment.
- Occupations and Compensation Paid
- Human Resources Policies
- Employee and Employment characteristics.
- Historical development, current challenges, future directions of industries in the sector,
- Pay Equity Issues and Options

Study Approach

The study is based on two data sources (1) quantitative information describing the sector characteristics including the industry divisions, the concentration of female employment, occupations and compensation paid; and (2) qualitative information describing employee and employment characteristics, human resources policies and practices and future directions and challenges.

INDUSTRIES IN THE SECTOR

The retail sector is a vital and dynamic component of the Ontario economy both in terms of the revenue it generates and in terms of the jobs it creates. The retail sector is broken down into twenty one subsectors or industry divisions and eighty nine separate industries. The industry divisions within retail are quite separate and distinct in terms of the products sold.

Table 1 identifies the eighty nine industries in the retail sector, and the total number of establishments in each industry, the total number of establishments by size, and the proportion of each size category to the total number of establishments in the sector.

Twenty four percent (21) of the industries have greater than one thousand establishments which account for sixty one percent of the total number of establishments within the sector. Eighteen percent (16) have less than one hundred establishments that account for six percent of the total number of establishments within the sector. This provides one indication of the diversity that exists within the sector.

Forty percent (26) of the industries in the sector do not have any establishments with more than one hundred employees. Seventeen percent (15) do not have any establishments with more than fifty employees.

Eighty four percent (52,716) of the establishments within this sector have less than ten employees and only one half one percent (332) - have more than one hundred employees (Excludes

consideration of establishments where the number of employees is unknown).

In the ten to nineteen size category, there is almost another ten percent (9.73%) who, by virtue of their size may not have jobs with which the female jobs may compare. That is, there may not be any differentiation between jobs held by females and or, there may be no males employed. Small businesses, particularly those with less than twenty employees have few job titles, most will have only two or three. Jobs are broadly defined, and duties like cash, receiving, serving customers, stock merchandising, etc. are performed by all employees in the establishment.

An examination of the distribution of specific industries by size indicates that sixty one percent (61%) of the food stores have less than five employees and a further twenty percent have less than ten employees. In women's clothing stores, sixty five percent (65%) have less than five employees and a further nineteen percent (19%) have less than ten employees. The percentages are roughly the same for florist shops, book and stationery stores, children's clothing stores. In cloth and yarn, toys, gift and novelties, and pet stores the percentage of establishments in the less than five category is somewhat higher but in the five to nine category is somewhat lower resulting in approximately the same distribution in the less than ten category overall, that is roughly eighty five percent of the establishments in these industries employ less than ten people.

In gasoline service stations, forty five percent (45%) have less than five employees and a further thirty percent (30%) have between five and nine employees, sixty three percent (63%) of the other household furnishing establishments employ less than five and a further nineteen percent employ between five and nine. This distribution is roughly the same throughout the motor vehicle industries with the exception of new and used automobile dealers. Only ten percent (10%) of the new automobile dealers employ less than five although seventy six percent (76%) of the used automobile dealers fall into this same category.

While there are variations, there would not appear to be a significant differentiation in the proportion of establishments with less than ten employees by industry. Establishments employing less than ten people account for 75-85% of total number of establishments in the sector.

Excluding the category for which employee numbers are not known, less than six percent or 3,733 establishments in the retail sector have more than twenty employees and more than half of these are establishments employing less than fifty people.

CONCENTRATION OF FEMALE EMPLOYMENT

Almost sixteen percent of all female employment in the province is in the retail sector. (Table 3). The retail sector accounts for 17.5% of the total Ontario female employment in establishments of less than five people, and 16.1% percent of total female employment in establishments of one hundred or more.

Table 2 identifies the concentration of female employment in the retail sector by industry division and size of establishment. Forty percent of the retail sector employment as a whole is female, with greater concentrations in the very small (less than five) and the very large establishments (over five hundred)

Female concentration is greater in establishments employing less than five employees in all industry divisions. In ten of the twenty one industry divisions (48%), they constitute in excess of fifty percent of those employed in this category. In the five to nineteen category, females constitute in excess of fifty percent of those employed in eight industry divisions (38%). However, in firms employing between twenty and forty nine and between fifty and ninety nine, females constitute fifty percent or more in only three (14%) industry divisions. In the over one hundred category, there are nine (43%) industry divisions where the concentration of female employment is too small to be significant. In the over five hundred category, this number increases to ten or 48%. For the purposes of this study, it is assumed that to the extent there are females in these industry divisions, in establishments employing more than one

hundred, there is likely to be a male comparator job.

By industry division, females are more likely to be concentrated in general merchandise (55%), women's clothing stores (82%), cloth dry goods (63%), drug stores (60%), florist shops (67%) and tobacconists (65%) than in motor vehicle dealers/repair (11%) or in hardware (34%), or in furniture and appliances (34%) or in liquor & beer stores (10%).

By size of establishment, females are concentrated in firms employing less than five in food stores (57.6%), general merchandise (67.2%), shoe stores (59.1%), women's clothing stores (86.3%), cloth dry goods (76.1%), drug stores (66.8%), book, stationery (62.8%), florist shops (77%), jewellery stores (60.%),and tobacconists (65.9%)

There is a lower level of female concentration in establishments employing less than twenty but more than five, in every industry division except motor vehicle dealers and watch, jewellery repairs where the numbers were too small to be significant in the less than five category.

The decrease in concentration in females between these two size categories is significant and, for the most part substantial. Decreases vary from 1.7% in motor vehicle repair where females constitute only eleven percent of the total employment. In shoe stores and food stores where females constitute 38.9% and 38.4% of the industry the decrease in concentration was 15% and 14.7% respectively. In women's clothing where females constitute eighty two percent (82%) of

total employment, the decrease was almost seven percent (6.9%)

The average decrease in concentration of females for all industries is ten percent (10%) suggesting that throughout all industry divisions in retail there is a significant difference between how jobs are organized and defined between firms employing less than five and all other size categories. One explanation is that in the very small firms the owner/franchisee/manager and the female sales/cashiers carry out many of the duties performed by males in the larger establishments, e.g. receiving, warehousing, sales. As establishments become larger, people, specifically males, are hired to carry out these duties and there is a relative increase in demand for these functions as the establishment increases in size.

For the most part females in the retail sector are cashiers salespeople and office/clerical support in all size of establishments in all industry divisions. As establishments become larger, they may not need more cashiers and salespeople but they may need receivers, truck drivers, warehouse people, i.e. jobs currently predominated by males.

Female concentration, for establishments employing more than fifty, increases again suggesting that as establishments become larger there is increased demand for cashiers, office and salespeople. This would appear to be true for most industry divisions except motor vehicle dealers, cloth dry goods, hardware stores, and drug stores where it would appear as these industries

become larger the need additional sales/cashiers is relatively less than for other occupations or, that females are not recruited into these "other" occupations.

DISTRIBUTION OF FEMALE EMPLOYMENT

An additional dimension to an analysis of the concentration of female employment in the sector comes from an examination of distribution of female employment within the sector. For example, while females constitute forty four percent of all those employed in establishments of less than five, this accounts for only 10.9% of all females employed in the sector. Slightly more than one quarter (26.5%) of all female employment in the retail sector is in establishments employing less than twenty people. Almost fifty percent of females employed in the retail sector are in establishments employing more than five hundred employees.

By industry division, food stores and general merchandise account for almost fifty percent of all female employment in the sector with the majority employed in establishments employing more than five hundred. At the other end of the spectrum, there are nine industry divisions that account for 8.7% of the total female retail employment.

Women's clothing stores which are predominantly female (82.3%) employ 7.6% of the females in the sector. Thirty one percent of the females employed in this industry division work in establishments employing less than twenty, that is, where a male comparator job is not likely to exist. Fifty one percent of the females in this industry division are employed in firms of one hundred or more. Some male comparator jobs are likely to exist in these larger establishments, however, they may not be appropriate for pay equity comparisons,i.e. they may not be of

relatively equivalent value.

Other predominantly female industry divisions, i.e. where female concentration is in excess of sixty percent, account for sixteen percent of the total female employment in the sector [cloth dry goods (4.2%), shoe stores (2.1%), drug stores (6.1%), florist shops (1.2%), jewellery stores (2.2%), and tobacconists(.4%)]. The levels of concentration in these industry divisions overall would suggest that there is likely to be establishments where there are no male jobs with which to make comparisons particularly in establishments employing less than twenty.

While motor vehicle repair accounts for only 1.1% of total female retail employment, seventy six percent is in establishments of less than twenty. Motor vehicle dealers account for 1.8% of total female retail employment. Similarly, hardware stores account for 1.4% of total female employment, seventy one percent is in establishments employing less than twenty. Concentration of females in these two sectors is relatively small however, because of the nature of work in these industries, male jobs where they exist may not be comparable. (salesperson vs cashier)

OCCUPATIONS AND COMPENSATION PAID

For the most part, occupations in retail involve selling commodities and applying knowledge of characteristics, quality and merit of items sold. Activities include: displaying merchandise or demonstrating article, emphasizing saleable features; advising customer on care and use of article; estimating or quoting prices and credit terms, trade-in allowances and delivery date; preparing sales slip or sales contract; receiving payment or obtaining credit authorization; preparing inventory of stock; and performing other duties such as wrapping and packing customers' purchases' (Canadian Classification and Dictionary of Occupations).

The foregoing does not differentiate between sales people in automotive, bakery, drug store, grocery store, furniture store sales or any sales occupations that are the subject of this report. This might suggest that although there may be differences in sales occupations, they are sufficiently similar to be categorized together and that there is not differential levels of technical expertise required so as to warrant separate classification and identification. Alternatively, it may suggest only that it is a convenient way of grouping retail sales occupations.

Labour Canada, in its 1985 Wage Rates, Salaries and Hours of Labour, on the other hand, differentiates salespersons as follows: Class A salesperson is defined as "requiring little knowledge of merchandise sold"; Class B salesperson is defined

as "requiring enough knowledge of products to assist customers in making selections"; and Class C salesperson is defined as "requiring detailed knowledge of products and considerable skill in salesmanship". Research indicates that within the sector, establishments do recognize different levels of salespersons and that these differences exist between industries and within establishments.

While there are variations in occupations within the retail sector as a whole, there are broadly defined occupations found in most industry divisions. An examination of the essential elements of these representative jobs revealed :

(Note: the following is intended as a generic description of the types of duties within these occupations only. Significant variations exist between establishments. For example, in some establishments a cashier may perform cashier duties only while in others, they may perform duties related to both cashier and sales).

The main duties of a Cashier are to receive payment for goods purchased by customers and processing purchase transactions. Use cash register/electronic point of sale terminals, telephone (for customer service and to verify credit as appropriate), packaging purchased goods, recording total sales. At more senior levels a cashier may also be responsible for banking and other related duties, training part time cashiers, and controlling cash summary reports. There are no selling responsibilities. Every industry division and virtually

all establishments have cashiers, most of whom are female.

In addition to performing cashier duties, some cashiers are also the `office person' performing `routine clerical functions' or they may also act as a salesperson.

Salesperson (A) duties involve personal service of customers. In general sales, personnel assist customers with merchandise selection, store `housekeeping', displaying merchandise for sale, participate in promotions for `special events', place new stock in inventory, assist with merchandise changes and count stock. **Salesperson (B)** duties are, for the most part the same as for the Salesperson (A), the main difference is in the required level of knowledge of product being sold. **Salesperson (C)** duties are similar to the salesperson (A) and (B) but requires specialized and/or technical knowledge such as might be required to sell cars, computers, furniture and appliances. In addition to the three levels of salesperson, sales occupations are further differentiated according to whether or not their compensation is determined in whole or part by commission rates.

Most establishments within each industry divisions have sales persons. The type or categorization of the sales people varies by industry division, within industry division and, to some extent, within establishments. Some industries have primarily male commission salesperson C while others may have only non commission salesperson A while some others may have a combination of salesperson B and C commission and non commission.

Shipper/receivers are responsible for shipping and receiving merchandise to and from the store. This entails unloading merchandise, writing merchandise transfers, maintaining inventory, reordering supplies and sometimes attaches the security wafers to clothing.

While all industry divisions will have shippers/receivers, a large number of establishments do not. (The same applies to warehouseman/woman). The presence or absence of either/both shippers and receivers tends primarily to be a function of the size of the establishment and, to a some extent, to the products sold. Chain stores, if they have more than two or three outlets and operate from a centralized management are more likely to have these occupations while single, independent stores are less likely to.

As indicated, each industry division will have occupations unique to that particular division however each industry division in retail will have cashiers, salespeople, shippers/receivers or some combination of these occupations. The classification of specific occupations within retail is driven by the product being sold. For example, food stores are likely to have meat wrappers and grocery clerks while clothing stores may have merchandisers and tailors/alterationists.

To the extent that all establishments have the occupations described, these occupations will be highlighted. It is assumed that if an establishment has these occupations and they are an 'predominantly female establishment' issues related to these

occupations will, for the most part, also relate to the occupations unique to a particular industry division.

Table 4 illustrates typical occupations within the retail sector and average wage rates for selected occupations.

Food Stores

Within retail food stores, females comprise virtually all of both full and part time cashier positions (96.5% and 80.2% respectively) as well as the meat packager (92.3%). Men on the other hand are concentrated in the meat cutter, receiving clerk, sales clerk and warehouse positions (99%, 98%, 83% and 100% respectively).

The average wage rate for males in the full time cashier positions, where they make up three and a half percent (3-1/2%) of the occupation, is both above the industry average and above the average female rate. This is likely attributed to the fact that males in cashier positions are employed in larger unionized establishments. Females, while they make up the majority of those employed in this occupation are likely to be employed in all sizes of establishments, both union and non union. Since the average female rate parallels the industry average and is ninety percent of the union rate, females appear to constitute a large proportion of those in union establishments as well. To the extent that females are employed in non union establishments where the average wage rate is only sixty one percent of union establishments. their wages in this occupation are likely to be lower.

In the part time cashier category, the average wage rate for females is above the industry average and the male average wage rate. However, this is $2.76 less than the average full time rate for females and $3.14 less than the average full time rate for males. Since the female rate is above both the industry average, the male average and the nonunion average, it would appear that part time female cashiers are employed in union establishments but not necessarily the same establishments as the full time cashiers; and/or, that there is a fairly wide variation in both union and non union wages for part time cashiers. The latter appears likely to be the case. Size of establishment is a key variable in this variation.

There is almost a $4.00 differential between unionized part time cashiers and unionized full time cashiers which suggests that (1) part time people are paid less than full time cashiers, and/or (2) part time cashiers are not employed in the same establishments as full time cashiers and that they have a lower negotiated wage rate. Both are likely to contribute but in varying degrees.

In the meat cutter occupation, the average male rate, the industry average and the union average are almost identical suggesting that meat cutters are primarily male and primarily unionized. Females constitute only 1% of the total employees. The female rate is significantly less than the non union rate suggesting that where females are employed as meatcutters, they are will be in smaller establishments.

In the receiving clerk category females constitute only 1.4% of the total number of employees. The female average, the male average, the industry average and the union average wage rates are sufficiently close enough to suggest that to the extent this occupation exists, it exists in unionized environments or that the market rate mirrors the negotiated rate or vice versa.

In the warehouseman/woman category, there is no wage rate indicated for females suggesting that females are not warehouse people. In establishments with male warehouse people, this may represent an area of comparison for female dominated jobs.

For the most part, the larger retail food stores are unionized and wages are therefore negotiated. The smaller retail food stores by definition employ fewer people, are more likely to be single franchise or owner operated as opposed to part of a chain, and are less likely to have a union (see section on collective bargaining).

The data suggests that wages in the non union sector are approximately sixty percent lower than both the industry average and the union wage rates. This does not in itself present problems insofar as the pay equity legislation is concerned. For the most part larger retail food stores whether they are chains or franchises have male dominant occupations and female dominant occupations. Comparisons in these establishments are likely to exist.

In the smaller retail food stores however, no such comparisons may exist because of both size and composition of the

workforce - there may be no male employed. The only male may be the male owner/manager.

Retail food stores include food stores, supermarkets, grocery stores, bakery products stores, candy and nut stores, fruit and vegetable stores, meat markets and specialty food stores - 12,237 establishments of which 55.6% have less than five employees and a further 20% have between five and ten employees. It would seem unlikely that there will be a male comparator in these establishments. In the ten to nineteen category there is a further 11% who, because of the way work is organized, i.e. broadly defined jobs where there is little or no differentiation between what females and males do, or no males at all, may not be able to make comparisons.

In the 20-100 categories there may be sufficient identification and differentiation between jobs held by males and jobs held by females that comparisons may be made. In addition in these size of establishments there is more likely to be a male job with which to make a comparison to - for example stock/receiving clerk (male) to cashier (female).

It was estimated by a representative of the United Food and Commercial Workers that approximately two to five hundred females within retail food stores would have no male comparator. This comment is most likely to refer to females in smaller retail food stores and not to the larger food stores which would appear to have both females and males employed.

Other Retail Trade

Outside of the retail food stores, the problem of female and male comparators becomes more acute. It would appear that the balance of the retail sector is, to a large extent segregated by industry and by occupation. While, females do work in all industry divisions, they are likely to be concentrated in specific industry divisions and within industries, specific occupations.

As indicated earlier, females constitute the overwhelming majority of those employed in women's clothing, cloth dry goods, drug stores, florist shops - that is, in industries where, with the exception of drug stores, over eighty percent of the establishments employ less than ten people.

In addition, in other retail trade, females tend to be concentrated in five occupations - cashier (91%), salesperson (non commission) classes A and B categories (84%) and as tailor/alterationists (73%). Males, on the other hand, are concentrated in the commissioned sales Class B (60%) and commissioned sales Class C (74%) and in warehouse occupations (95%).

Table 4 indicates that while females constitute almost ninety one percent of the cashiers, their average wage rate is only forty three percent of the average male rate and eighty nine percent of the industry average. Both the industry average and the non union average is only forty nine percent of the average male rate and the union rate. This would seem to imply that not only are the majority of cashiers in Other Retail Trade female,

but also that female cashiers are distributed across all industry divisions. In addition, they are unlikely to be either employed in the same establishments as their male counterparts, or to be in unionized establishments or to be eligible to be in the bargaining unit if a union exists. Further, since the non union wage rate is ninety nine percent of the average female rate, the non union cashiers would appear also to be predominantly female. To the extent that male cashiers exist in non union establishments, their wage rates closely resemble that of females.

The average wage rate for females in the salesperson class A and the non commission salesperson B category is slightly higher than both the industry average and the male average. There is no union rate for either of these occupations. The average wage rate for males, although they comprise fifteen percent of the occupation, is 42.8% and 48.3% less than what males receive as cashiers. This indicates that male cashiers and male salesperson A and B are unlikely to be employed in the same industry: that the industries where salesperson A and B are employed pay below the market rate for sales people in general but not necessarily for sales people within that industry; and that the market rate for these jobs may be significantly influenced by the minimum wage, and by the level of part time work. Females on average earn slightly more than males which may reflect differences in length of service/hours of work rather than differences in industry or industry pay rates. The arguments that apply to the

salesperson A and B male are as likely therefore to apply to salesperson A and B female.

Of particular significance is the decrease in the proportion of females in the commission salesperson classes B and C compared to their participation in the non commission sales classes. While females constitute over eighty percent of those in the salesperson Class A and B category, they represent only forty percent of the salesperson Class B commission category. In the salesperson C class, they represent over sixty percent of those on salary but only twenty six percent of those on commission. There would appear to be significant differences between female and male salespeople in the retail sector in terms of the markets they serve and their method of compensation. To the extent that females are employed as salesperson B or C commission, the method of determining commission varies significantly from a flat rate percent of sale to a "draw" system.

From Table 2 it is apparent that males and females are concentrated in different industries. Females are most likely to be employed in general merchandise, women's clothing, cloth dry goods, drug stores and florist shops while males are most likely to be employed in hardware, furniture and appliance, tire and battery, gas service stations, motor vehicle dealers and repair, radio-T.V. elect. repair and liquor and beer stores. From this is clear there is a distinct difference between the markets that females predominate and the markets that males predominate. Females, for the most part, are likely to be found in highly

competitive, high volume low ticket price goods while males are likely to be found in low volume higher ticket price goods.

This variation in markets may occur not only from industry to industry but within establishments as well. For example, in general merchandise category females and males are concentrated in areas similar to the differentiation in the broader industry divisions - males in furniture and appliances, stereos, hardware and females in cosmetics, apparel etc.

The average wage rate for the commission sales person B female is thirteen percent less than that the industry average and twenty two percent less than that for males despite the fact that females comprise in excess of forty percent of the total number of employees. Similarly, the average wage rate for the commission sales person C female is twenty seven percent less than the industry average and thirty three percent less than that for males. Only twenty six percent of the salesperson C are female. This would seem to indicate that female and male salesperson C are employed in different industries, and/or that within industries there may be different formulae for determining commission rates. An additional possibility which cannot be determined from the information on the table is that within establishments, there may be different formulae for determining commission.

There are a variety of formulae for commission sales. For example, some sales people receive a salary plus a percent of sales, usually around 1%. Some others receive a salary plus a

bonus which is a percent of total sales for the establishment. Still others operate on a straight commission where they may receive a draw of $200-$400 per week but they have to pay that back out of their commissions on sales. Commissions run about 6%+ of sales.

The commission formula usually relates to the industries which in turn relates to the products being sold. Industries like Motor Vehicles, Furniture and Appliances, T.V. Stereos usually operate on the straight commission/draw system. These represent the Salesperson Class C commission.

Industries like men's, women's clothes and shoes operate on a salary plus percent of sales. These represent the Salesperson Class B commission.

Industries like food, drugs, books, florists and some clothing work on a straight salary, no commission. These represent the Salesperson Class A and Class B non commission.

In addition to whole industries using commission formula, there are variations within industries and within establishments. For example in large department stores like The Bay, Eatons and Simpsons, there are Commission C salespeople who sell furniture and appliances, stereos, computers, etc. who operate on a draw system and there are salespeople B who sell general merchandise, clothes, shoes who, for the most part, receive a straight salary.

Industry representatives indicated that for the most part they have not been successful in recruiting females in large numbers into the commission Salesperson C category. There is the

perception of added risk that females either can't afford or are not willing to take. Females, it was suggested, need the sense of a secure on-going income, with little or no fluctuation. Overall differences in compensation between Salesperson B and C may be insufficient to warrant the additional risk.

In the warehouseman/woman category, the average female rate is significantly less than the industry average and the non union average. The male rate is however, comparable to the industry average and the union average. This indicates that to the extent that females are warehouse people, they exist in non union establishments. If an establishment has sufficient female warehouse people comparisons may not be possible (not a male dominant occupation).

Office/Clerical Occupations

To the extent that retail operations are large enough to employ people in clerical and office occupations, they are also likely to have male comparators within the establishment. As establishments become larger and occupations become more defined and differentiated, clerical support occupations are likely to be added. Occupations like warehouse people and/or shippers and receivers, which are usually male dominant, are also likely to exist with which to make comparisons.

HUMAN RESOURCE POLICIES

Personnel policies and practices within the sector vary widely with the size of establishment being a key variable. Virtually ninety percent of the establishments in this sector have less than fifty employees and about seventy five percent of these have less than ten. By definition, these establishments are in the `small business' category.

In the majority of these establishments, personnel related issues are handled by the owner/operator of the establishment. Job descriptions are unlikely to exist at all. If they do exist, they tend to be broad, similar to those presented earlier in this report. For the most part, there is no formal mechanism for job evaluation.

Establishments in the less than fifty in general pay `what they have to'. For the most part they pay the `going rate' for people in similar occupations in similar industries. Only in specific circumstances would they pay outside/above that rate for any employee.

Establishments employing more than fifty but less than two hundred usually assign personnel related issues to a specific area or person to be handled along with their regular duties. These establishments have become large enough that occupations are more differentiated and compensation practices are more formalized than in the smaller firms. Some job descriptions exist. In the smaller establishments (less than one hundred) jobs tend to be ranked according market value.

Establishment with more than two hundred are likely to have an individual with the responsibility of handling personnel related issues. Some job descriptions may exist. Jobs are evaluated if/when a new job is added but for the most part job evaluation is not an on-going activity.

For the most part there is little occupational movement within the retail sector. Industry divisions where females constitute a small proportion of the total number of employees provide few if any opportunities for advancement. Salespeople in other retail may move up to be store managers but this opportunity is limited. In general merchandise, sales persons can become department managers but this opportunity is also limited. Within food stores cashiers can move up to head cashiers but there is little opportunity for upward mobility beyond this.

Because there is limited or no upward mobility, the only opportunity for advancement is frequently by changing employers. Females, working in small establishments, may opt to work in a larger store where there are additional opportunities and higher compensation.

Recruitment practices, until recently,. was frequently by word of mouth, networking through friends and family, or a sign in the window. Advertising was considered too expensive with little or uncertain results. More recently however, because of labour shortages, an increased level of newspaper advertising has taken place. On site visits to competitors stores are also

being used as a method of recruiting qualified personnel.

Compensation practices in retail (as in other sectors) are determined primarily by the establishment's ability to pay. The majority of establishments in the retail sector, particularly where females predominate, are in highly competitive industries. The size of establishment and the degree of competition has significant implications for the establishments ability to pay. These industries/establishments tend to pay below the average retail market wage. An increase in their total compensation would make some establishments non profitable which could result in lower levels of employment overall or closing the operation.

EMPLOYEE/EMPLOYMENT CHARACTERISTICS

Educational Requirements

Employees, particularly those associated with customers, in the retail sector are recruited primarily for technical and interpersonal skills than a requirement for any particular educational level. Technical skills include previous retail experience, experience with point of sale cash terminals, analytical ability as well as good communication skills. Interpersonal skills in terms of good grooming, appearing friendly, outgoing, mature and self reliant with initiative are also seen an important for someone to be hired in retail.

Age Characteristics

Table 5 examines the relationship between the age of female employees and the size of firm in which they are employed and the proportion of average earnings by firm size and age. This indicates that retail establishments that employ more than five hundred employees are also likely to hire younger female workers (see section on part time employment). The distribution of females by age reflects no unusual pattern of employment by firm size save and except that firms of less than five are somewhat more likely to employ females over 45.

The proportion of average earnings by age for females in the age categories 0-14 and 15-24 is roughly the same as for their male counterparts. This would appear to reflect the requirement to pay both sexes the same under minimum wage laws and the similarities of occupations for these age groups. For example,

in the under 25 category, males and females are recruited for general sales/cash positions where, until recently, there was an abundant supply. Wages could therefore be held at or near the minimum wage levels because females and males were virtually interchangeable and high turnover was viewed as a natural phenomenon.

Part Time Work

Part time work is widely used in the retail sector in order to attract and retain people, to meet the needs of peak business times, and to meet employee needs and desires for a flexible work schedules.

Females are more likely to work part time in almost every age category. Table 6 illustrates the part time/full time employment status by age and sex. In the 15-19 age group, over three quarters of those employed are employed part time. There is little difference in the concentration of part time work for females and males in this age group.

This pattern, however, shifts abruptly for both sexes in the next age group where, of those working, only thirty five percent of the females and twenty percent of the males work part time. Once males reach twenty five, which would appear to coincide with the completion of formal education, they are not likely to work part time at all. After age 19 part time work for females is very consistent in every age category. Roughly one third of all female employees in the retail sector work part time. While females comprise roughly forty percent of all retail employment,

they make up roughly seventy percent of all part time employment and ninety percent of the part time employment for age groups 25 and above.

Wages for part time workers are significantly less than those for full time workers, and significantly less for those who do not have collective bargaining compared to those who do. (See previous discussion on occupations and compensation paid).

In addition to large variations in wages between part time/full time employees and between those who do/do not have collective bargaining, there are also variations in whether or not part time workers have benefits. Larger establishments are most likely to have a benefits package and to offer it to both full time and part time employees on a prorated basis. However, females are over represented in smaller establishments (less than twenty), in particular industries (florist shops, cloth dry goods, women's clothing). For the most part, these size of establishments in these industry divisions do not provide benefits beyond what is required by law, for either full time or part time employees. In other industry divisions and size of establishments there are significant variations as to if and what benefits exist for both full and part time employees.

Collective Bargaining

Table 7 provides information on the number of collective agreements in the retail sector in terms of full time/part time employee coverage. Twenty eight percent of the collective agreements in retail do not specifically exclude part time

workers. To the extent that these establishments have part time workers, they will be covered by the collective agreement for full time workers. Thirty percent of the collective agreements however do specifically exclude part time workers. Food stores and department stores account for the majority of collective agreements covering full time employees only and part time employees only. That is, to the extent that food and department stores have unions, they are likely to have separate collective agreements covering full time and part time employees.

Within the retail sector, food stores account for approximately sixty four percent of the full time employees represented by a union and thirty percent of the collective agreements covering full time workers. The United Food and Commercial Workers is the largest union representing food store workers.

Department stores account for thirteen percent of the full time employees represented by a union and eighteen percent of the collective agreements. The Retail Wholesale and Department Store Union represents the majority of employees in department stores.

While collective bargaining exists within other industry divisions, both the number of full time employees represented and the number of collective agreements would indicate it is not a major factor in other retail industries. (See tables 7 and 8).

For part time workers, forty one percent of the collective agreements are in food stores. Food stores account for eighty four percent of the part time workers who have collective

bargaining. Department stores account for one third of the collective agreements covering part time employees and fourteen percent of the part time employees who have collective bargaining. The same unions represent part time workers as full time workers.

From this, it is apparent that in industry divisions where females predominate, there is virtually no collective bargaining outside of food stores. Collective bargaining, where it exists, is in industry divisions where males dominate and where the number of employees is in excess of twenty.

The degree of part time work, the concentration of females in specific industry divisions and the significant proportion of smaller size firms would seem to explain the relatively low level of collective bargaining that exists within the retail sector in general and in establishments that employ females in particular.

Cultural Characteristics

Table 9 identifies cultural characteristics in the retail trade labour force as of 1981. While the pattern of immigration has changed significantly since 1981, this information is useful in illustrating patterns of employment. For example, three quarters of those employed in retail trade were born in Canada and an additional five percent were born in english speaking countries (U.S. and U.K.) which would appear to reflect the need within retail to communicate in english. This was supported by industry representatives who confirmed that the ability to communicate in english was an essential element of the majority

of occupations in retail, particularly those occupations where customer contact is a significant aspect of the job.

In addition to the ability to speak english, other required characteristics included being able to understand the customers needs, to be able to approach customers and suggest/recommend items all of which may be characteristics more prevalent or, perhaps more developed in the North American culture.

Industry representatives suggested that there is a need for better training programs before immigrants can be recruited into retail occupations requiring a large degree of customer contact.

To the extent that immigrants constitute almost twenty percent of retail employment, they tend to be concentrated in specific occupations and specific industries. Immigrants who start their own business tend to employ immigrants of the same nationality.

A further breakdown of employment by industry division of the immigrant population would assist in determining if females of particular ethnic origins are concentrated in any particular industry and, if, by virtue of their cultural background, are concentrated in particular occupations. This information would not appear to be available at this time.

Interviews with members of ethnic women's group provided little or no insight into the position of females in the retail sector in particular. While they have definite concerns about pay equity in general, the retail sector was not identified as particularly troublesome. This is likely because female

immigrants are not concentrated in the retail sector and where they do exist, they are largely segregated into establishments according to ethnic origin.

HISTORICAL DEVELOPMENT OF THE SECTOR

a) Retail Trade

Table 10 shows that retail trade has grown on average slightly over four fold during the period 1973-1987 from $14 Million to $59 Million. Not all industry divisions within the retail sector have increased at the same rate however. Some have grown more, for example, specialty shoes have experienced over an eight fold increase, and sporting goods and accessories have shown almost a seven fold increase, both of which reflect the increased consumer emphasis and attitude toward fitness.

Other areas, notably variety stores and general stores have experienced less than two fold increases or less than half the average increases. This might suggest that these two industries have a specific niche in the market but that niche is fairly well defined.

Eleven (39%) of the twenty eight industry divisions show increased sales over the average. Of these, grocery, confection and sundry; women's clothing stores; pharmacies, patent medicine and cosmetics; book and stationery stores; and personal accessory stores would appear to have a female concentration of fifty percent or more (From table 2).

In addition to the increase in retail trade, the shift from independent stores to chain stores in sixteen of twenty one industry divisions is significant. For example, in 1973, chains accounted for almost forty seven percent (46.7%) of sales in women's clothing stores, by 1987 chains accounted for almost

seventy percent (69.7%) of sales. Similarly in family clothing stores chains accounted for thirty five percent (35.4%) of sales in 1973 but by 1987 they accounted for seventy six (76.3%) of sales. The decrease in sales in the combination (grocery and meat) category from seventy eight to seventy percent reflects the exit of a number of large grocery stores.

The shift from independent stores to chain stores could have significance for an all female establishment study in that as chains become larger, they are more likely to develop more formalized human resource practices than are smaller chains or independent stores that operate in a more ad hoc basis in terms of human resource policies. This assumes that the same employer operates all stores in the chain or, if there is franchising in the chain, that the franchiser spells out personnel policies.

Table 11 provides an examination of retail chains by number of outlets. Retail chains with over one hundred outlets exist in only two areas - ladies wear and automotive. Ladies wear as a whole have more chains with more outlets in total (118) than any other type of chain. There are thirteen ladies wear chains that have in excess of one hundred outlets each.

There is no direct linkage between the number of retail outlets in a chain and female employment. However, to the extent that females represent in excess of fifty percent of the total employment in general merchandise, women's clothing, cloth dry goods, drug stores, book stationery, florist shops, jewellery stores (From table 2) and that these represent areas where there

is also a large number of retail outlets in each chain, it may be significant in terms of an all female establishment study. For example, if a retail chain has a large number of outlets, some may be centrally operated with common personnel policies, some may be franchise outlets that operate under personnel policies set out by the franchiser, or some may be franchise outlets totally decentralized in terms of personnel policies. Each of these represents possibilities such that within a given retail chain there may be three separate methods of operating the business and three separate approaches to personnel policies. The more centralized the operation, the more likely that compensation practices will be formalized. To the extent that each outlet in the chain operates independently, human resources policies are unlikely to exist.

To some degree this represents the situation at Dylex where they operate a number of retail chains, with varying numbers of outlets, who are separate from the corporate headquarters but whose human resource policies are established corporately. Each chain however has a separate personnel function, separate management, separate warehouses etc. They also have some outlets that they have varying degrees of ownership - for example, Harry Rosens is owned fifty percent by Dylex and fifty percent by Harry Rosen. For pay equity purposes, it is anticipated that each chain will represent a separate establishment. Comparisons would therefore exist within a given chain but not across chains. The chains within Dylex are more or less segregated by sex. For

example, a Braemar employs predominantly females while a Harry Rosen employs predominantly males. Similarly Fairweather and Big Steel which frequently operate side by side. Comparisons are therefore likely to exist within each of these chains but not between chains.

The more outlets a retail chain has, the more likely it will operate in other provinces as well as in selected centres in Ontario. Within Ontario, the more likely locations for retail outlets are in the larger centres with the majority in the Central Ontario region. That is, if a retail chain has a number of outlets, the majority of them will be concentrated in the Central Ontario region reflecting the distribution of the population in general. Not all retail chains that have outlets in Central Ontario will have outlets in other areas of the province.

b) Employment Creation

The retail sector is highly competitive and volatile registering large numbers of firm births and deaths in any given year. While births and deaths occur in each of the industry divisions at all times, the state of the economy is a significant predictor of both. For example, Table 12 indicates that in 1978, i.e. at the early stages of the last recession, there were significant deaths in almost every industry division and particularly in firms with less than twenty employees. In contrast, in 1983 when the economy in Ontario was in a period of growth, there were significant numbers of births registered,

again particularly in firms with less than twenty employees. The births that occurred by 1983 to a large degree offset the deaths experienced in 1978. The total number of firms in a large number of industry divisions however did not reach the pre-1978 levels. In general merchandise, women's clothing stores, clothing and dry goods, i.e. areas where females comprise fifty percent or more of the total employees there was a net decline in the numbers of firms of 15%, 8% and 7% respectively.

While the total number of firms in these industry divisions is less, there is nothing to indicate that there was necessarily a corresponding decrease in employment. If, for example, there were increases in retail chain outlets, the number of establishments would not have increased but the employment within each, because of the increased number of outlets, may have generated an increase in employment.

Table 13 examines the effect of an change in the number of establishments on employment by size of firm in the retail sector between 1978 and 1985. Overall, there was a twenty one percent increase in the number of establishments and a twenty three percent increase in the average labour units employed. (Average labour unit is derived by dividing the annual payroll by an appropriate estimate of average annual earnings to reflect the annual mix of workers and earnings - includes regular, part time and overtime).

In firms of less than five there was a significant increase in the number of establishments (28.6%) as well as a substantial

increase in the number of average labour units (111%). To the extent that females are concentrated in firms employing less than five, this would likely translate into employment both part time and full time.

Of particular importance is the increase in the number of establishments in each category employing less than fifty people and a decrease in the number of establishments in each category employing more than fifty people which may be indicative of a trend towards smaller establishments. To the extent that females are employed in virtually all industry divisions in establishments employing less that fifty people, this may translate into employment. (See table 2)

Despite the net decrease in the number of establishments in each category employing more than fifty there was an increase in the number of average labour units employed. While this reflects an increase in employment in these size categories overall, there is no indication of the breakdown of employment creation for females or the industry divisions in which the increases occurred or whether the employment was full time or part time. It is significant only to the extent that there was employment creation and it is reasonable to assume that employment would be created for females in roughly the same proportion as their population within the sector.

c) Future Directions

The future of the retail sector, like the past, will to a great extent be dictated by the state of the economy and the

level of competition within industry divisions. In some industry divisions, notably women's clothing, we are currently "overstored". If retail sales decline or if operating costs increase, there will likely be significant numbers of stores, particularly in this industry, who cease to operate.

One of the most significant factors affecting the future of retail is the current and growing labour shortage in virtually every area of retail. One growing and significant trend in general merchandising, men's and women's clothing is that of 'scouting your competition' to recruit personnel. Organizations have a representative visit their competitors to watch the personnel do their jobs. They approach people they perceive to be 'good' and ask them if they would consider a move to their organization. This practise is particularly troublesome for smaller operations where an increase in wages might reduce their profitability to a level that jeopardizes the survival of the business.

The Retail Council indicated that while the larger establishments might have responded to the pay equity legislation by considering more carefully employment and compensation policies, this is now more likely to happen as a result of labour shortages than anything else.

Employment and pay practices are seen as significantly constrained by the level of competition within the industry. While there is/will be some bidding up of wages over time as a result of the labour shortage, this is likely to be constrained

by the fierce competition - particularly true in those industries where females predominate. This would suggest that wages in industries predominated by females are less likely to rise or will rise slower than wages in other areas of retail further exacerbating the wage differentials that currently exist.

In general, the Council suggested that if retailers have to pay more per hour, they would need to respond with fewer hours. This would be practical only to a point - a certain number of personnel are necessary in order to carry on business assuming business is to be carried on in the same way. This may translate into fewer full time hours and more part time hours in general.

Other responses that retail establishments have considered in response to the shortage of labour in general and wage adjustments that may result from pay equity in particular include (1) offering less than full service outlets by having central check out/cashier functions and fewer sales personnel to assist the customers; (2) increase the use of technology, particularly scanners to speed up the check out function and help cut down on shrinkage; (3) increase the use of electronic point of sale terminals to help with banking and inventory control.

More drastic measures could include repositioning in the market in terms of the merchandise sold, moving to smaller centres, changes in the product mix, and closing down some stores.

Large department stores, like large food stores, are seen as particularly vulnerable in the future. The overhead carried by

these large establishments makes it more difficult for them to respond to competitive pressures and increased wages overall.

APPENDIX 1 - ISSUES AND OPTIONS

This section addresses issues and options for predominantly female establishments within the retail sector where there are no male comparators.

The retail sector provides significant challenges for pay equity. Eighty five percent of the establishments employ less than twenty people which represents one quarter of the females employed in the sector. Sixty percent of the females employed in the sector are in establishments of over fifty who, for the most part, will have some male jobs with which to compare.

The industries where females are predominant are fiercely competitive and routinely record significant numbers of births and deaths. There appears to be significant differences between the industries where females dominate, those that men dominate, and those where there are roughly the same proportion of males and females in terms of product market and compensation practices. Outside of retail food stores, there is little or no collective bargaining. The retail sector appears to be segregated by industry, occupation and ethnic origin.

Given this brief synopsis, the questions become, are there problems associated with achieving pay equity in this sector? Within the meaning of Section 33 (2) (e) what are the options to providing pay equity in this sector? Should pay equity be extended to firms of less than ten?

The research would suggest that there are pay equity problems within the sector. Problems become more significant

with increased concentrations of females in a given sector however, for the most part, establishments employing more than fifty people are expected to be able compare female dominant occupations with male dominant occupations. This is particularly true in food stores and general merchandise but also likely in women's clothing, drug stores and book and stationery stores.

Where the concentration of females is large, over sixty percent, and the size of establishment small (less than fifty) there may be no male job with which to make a comparison. Females in these industries/establishments constitute approximately ten percent of total female employment in retail and are the main focus for consideration.

Using a wage line approach as an option to approaching pay equity would require that there be male and female jobs within the organization in general and a low paid male job to set the base of the wage line as well as a higher paying male job to set the upper limit of the line. In these smaller industries and establishments where females predominate, this is not likely to be the case. In firms of less than twenty, males if they exist, may exist at the lower end (warehouse/stockperson) of the job hierarchy but are unlikely to exist at both ends and not in sufficient numbers to provide a reliable wage line. Using this approach would mean that individual males or individual male jobs would have significant implications for the wages in the establishment. A likely response to this is to have no males in the establishment or to decrease the male wages (relatively) to

bring them in line with existing female wages. It is unlikely that the male job/s is/are sufficiently critical to the establishment to be allowed to influence the wages of all other employees. This could result in increased levels of segregation by industry. The analysis could also apply to establishments which are currently predominantly male for which there are no jobs females can compare. It is unlikely that females in predominantly male establishments would have the same impact on pay practices as males in predominantly female establishments.

In establishments of twenty to forty nine there may be sufficient males to provide a wage line in virtually every industry division and for a large number of establishments. Again, a very few male jobs are likely to strongly influence the pay practices of the organization. To the extent that there is no union and that females can be substituted into these occupations, establishments in this size group may also become more segregated by sex.

Paying for points is likely to produce similar results as the wage line approach.

Using a broader definition of establishment and employer may provide limited comparisons for some chain store operations who have twenty or more outlets. It is unclear if small chains operate much differently than independents in terms of their recruitment and utilization of human resources. Small chains may have an outlet in Toronto, another in Mississauga, another in London or Hamilton. In general the smaller chains are

distributed widely enough that they operate much like independent stores. Chains, as they become larger, are likely to have a centralized or corporate headquarters that sets personnel policies and operate like large establishments. These larger chains, while they may have pay equity problems, have predominantly female jobs and male comparator jobs.

An alternative approach for all female establishments is the `phantom male' approach. That is, to evaluate a male job or series of male jobs from the market (the same industry division) with their job evaluation system and compare the results with females jobs within the establishment. To the extent that the market rate for male jobs have equal or lower points but higher salaries, adjustments could be made. This approach however does not take into consideration factors in the market wage for males other than the male/female differential.

While pay equity problems exist within the retail sector, the solution to those problems are less clear. If, in the process of attempting to achieve pay equity establishments become more segregated by sex or there are larger numbers of deaths of firms, the `cure may be create more problems than the disease.'

Instead of further system intervention, it may be that the current and growing labour shortage together with the existing pay equity legislation may correct many of the problems within the retail sector. To the extent that the much of the retail sector falls within the definition of `small business' and small businesses are wage takers not a wage setters, as pay equity is

achieved within the larger organizations, the market wage rate for females will adjust accordingly.

The current and growing labour shortage is likely to interact with effects of the pay equity legislation. Male participation the labour force is currently at or near maximum. In order to attract more entrants into the labour force the price of labour is likely to be bid upward. Since males are already at or near maximum participation in the labour force, these new entrants will likely be female (or immigrants). While both males and females wages will be bid upward, because of the impact of the pay equity, the average wages of females relative to males are likely to be bid up more. If the average wage for females increases relative to males, the market wage for females in particular industry divisions is also likely to move up. While not all wages will be bid up to the same degree, there is likely to be a filtering approach throughout. This particular approach to achieving pay equity in predominantly female establishments may take longer to achieve but have fewer dislocating effects.

APPENDIX B - ATTITUDES TOWARDS SECTION 33(2) (e)

Pay equity as a practical consideration, is not an issue, neither is the consideration of pay equity in all female establishments. A more real concern is struggling to stay alive. This would seem to be the attitude with employers in general.

For the most part, the legislation is viewed as having an educational function. In reality, the regulations and enforcement mechanisms have limited value in this sector. There is no single pattern to business. Businesses, by the nature of their creation are individualized in their organization and, employ few people. For most businesses in this sector `the governments never going to get to them' because of the rate of enters/exits. Public awareness and acceptance of the rules will be the main function of the legislation.

The main concern about pay equity in general for small business lies in the area of enforcement. There is the perception that they will be presumed guilty and that they will need to `prove' to an outside agency that they are innocent. Small business in general is concerned that a single purpose agency will have its own agenda for survival and may therefore be over zealous in its mandate to justify its existence. This is perceived to present significant problems for the small business in general and not necessarily the small retailer who is largely segregated by sex.

In addition, there is the feeling among employers associations that pay equity in general does not consider the

accommodations made within the employment relationship, particularly in the smaller independent businesses. Pay equity, it was felt, involves a strict examination of pay without allowing for the trade offs made between employers and employees.

Some industry representatives were not aware of the requirements of section 33 (2) (e) and felt that all female establishments were exempt from the legislation.

Immigrant women's groups feel that pay equity is not the problem. They support the concept of employment equity not pay equity. The most significant concern for immigrant women is getting work at all. Once they have a job, they have to know about their rights, in their language and to feel that they can safely pursue these rights. There was the strong perception among immigrant women that employers/or other employees might retaliate if a pay equity complaint were lodged. Since there is no requirement to post a plan in the smaller establishments there will be little or no incentive for employers to comply with the legislation.

Some women's groups suggest that the legislation is complex for english speaking people to interpret and that there are a number of ways in which to 'side line' the intent of the legislation. A suggestion was made to disseminate pay equity information in various languages in a 'user friendly' format that can be readily understood by women with varying language and comprehension skills.

Labour groups had few comments about section 33 (2)(e).

They have little or no membership in establishments that would fall under this section of the legislation and therefore had not considered the problem.

The Equal Pay Coalition position to the standing committee on the Administration of Justice on Bill 154 was to 'give the Pay Equity Commission explicit power to compare the wages of women in these female job ghettos with an appropriate male group and/order the necessary wage adjustments.' The Coalition declined to provide information relating to research for Section 33(2)(e). Insofar as the retail sector is concerned, the 'female job ghettos' represent approximately ten percent of the female labour force in retail who are distributed across a variety of occupations in a large number of establishments in a number of industry divisions.

Table 1

DISTRIBUTION OF RETAIL INDUSTRIES
BY SIZE OF ESTABLISHMENTS
ONTARIO, 1987

sic 1	INDUSTRY DESCRIPTION	None	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500-999	1000-5000+	unknown	Total
6010	FOOD STORE	304	2 258	830	416	116	25	4				225	4 178
6011	SUPERMARKETS	53	378	172	185	220	92	27	10	2	4	78	1 221
6012	GROCERY ST. (EXCL. SUPERMKTS)	214	1 583	781	310	139	36	15	4	1		248	3 331
6013	BAKERY PRODUCTS STORES	57	584	304	196	69	7	3	1			66	1 287
6014	CANDY & NUT STORES	15	268	38	13	3						16	353
6015	FRUIT & VEGETABLE STORES	28	133	59	38	19	7	1	1	1		23	310
6016	MEAT MARKETS	23	256	99	59	27	3					23	490
6019	OTHER FOOD (SPECIALTY) N.E.C.	66	583	195	98	39	5	1	1			79	1 067
6020	LIQUOR, WINE AND BEER STORES		2	1									3
6021	LIQUOR STORES										1	1	2
6022	WINE STORES		2	1	1		1	1				2	8
6023	BEER STORES	1	1									2	4
6030	PRESCRIPT. DRUGS & PATENT MED.	5	12	10	7	5	1	1				5	46
6031	PHARMACIES	32	261	348	436	337	41	10	4	1	1	53	1 524
6032	PATENT MEDICINE & TOILETRIES	25	165	55	19	8	2	1				13	288
6111	SHOE STORES	54	495	183	101	22	12		2	1		47	917
6121	MEN'S CLOTHING STORES	96	666	246	103	25	7	1	1	1		67	1 213
6131	WOMEN'S CLOTHING STORES	147	1 534	477	208	78	17	10	2	1	1	96	2 571
6141	CHILDREN'S CLOTHING STORES	44	413	111	42	21	5	3				31	670
6142	FUR STORES	14	99	45	22	12	1					4	197
6149	OTHER CLOTHING STORES N.E.C.	69	501	144	83	34	15	7	3			49	905
6151	FABRIC AND YARN STORES	56	449	112	41	17	2	3	1			22	703
6210	HOUSEHOLD FURNITURE STORES	10	60	13	7	2	1					7	100
6211	HOUSEHOLD FURN. STORES (WITH APPL. AND FURNISHINGS)	44	327	148	76	29	7	3				24	658
6212	HOUSEHOLD FURNITURE STORES (WITHOUT APPL. & FURN.)	46	317	141	76	34	7	3		1		24	649
6213	FURNITURE REFINISHING AND REPAIR	119	570	92	33	12						36	862
6220	APPL. T.V., RADIO & STEREO	12	48	21	14	6						1	102
6221	APPL. T.V., RADIO & STEREO	70	433	150	64	20	3					26	766
6222	T.V., RADIO & STEREO STORES	135	1 153	366	150	43	17	1	2			79	1 946

sic 1	INDUSTRY DESCRIPTION	None	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500-999	1000-5000+	unknown	Total
6223	APPL. T.V. RADIO & STEREO REPAIR	156	751	125	36	9						50	1 127
6230	HOUSEHOLD FURNISHINGS STORES	1	10	5	2	1	1					3	23
6231	FLOOR COVERING STORES	26	263	129	71	23	7	1	2			14	536
6232	DRAPERY STORES	35	237	55	29	5	2	1				17	381
6239	OTHER HOUSEHOLD FURNISHING STORES	48	445	145	66	27	6	1				40	778
6310	AUTOMOBILE DEALERS	82	439	103	56	20	7	3				66	776
6311	AUTOMOBILE (NEW) DEALERS	16	108	180	332	332	157	54	1			57	1 237
6312	AUTOMOBILE (USED) DEALERS	64	295	66	16	1						28	470
6320	RECREATIONAL VEHICLE DEALERS	1	5	4									10
6321	MOTOR HOME & TRAVEL TRAILER DEALERS	9	80	49	29	9	1					9	186
6322	BOATS, OUTBOARD MTRS. & BOATING ASSE	18	204	106	62	20	1					8	419
6323	MOTORCYCLE & SNOWMOBILE DEALERS	21	160	85	37	12	1					10	326
6329	OTHER RECREATIONAL VEHICLE DEALERS	3	14	4	2							1	24
6331	GASOLINE SERVICE STATIONS	181	1 999	1 483	746	157	10	9	2	1	2	200	4 790
6340	AUTOMOTIVE PTS. & ASSES.	6	6	4	2								18
6341	HOME & AUTO SUPPLY STORES	3	15	16	17	64	64	39	3			9	230
6342	TIRE, BATTERY, PARTS & ASSEC.	42	443	179	87	29	3	1		1		34	819
6350	MOTOR VEHIC. REPAIR SHOPS	29	242	70	26	4						28	399
6351	GARAGES (GENERAL REPAIR)	300	2 861	708	229	42	5					128	4 273
6352	PAINT & BODY REPAIR SHOPS	210	1 526	526	292	86	2					130	2 772
6353	MUFFLER REPL. SHOPS	6	50	49	27	16	1	1				4	154
6354	MOTOR VEH. GLASS REPL. SHOPS	5	114	39	21	2	1	1		1		6	190
6355	MOTOR VEH. TRANSMISSION REP. & REPL.	10	128	58	22	2						4	224
6359	OTHER MOTOR VEHICLE REPAIR SHOPS	36	355	95	49	9		1				17	562
6390	OTHER MOTOR VEHICLE SERVICES		8	5					1				14
6391	CAR WASHES	36	228	95	52	20	4					36	471
6399	OTHER MOTOR VEHICLE SERVICES N.E.C.	63	385	109	51	15	1	1				34	659
6410	GENERAL MERCHANDISE STORES	93	709	211	75	15	2	1	1			88	1 195
6411	DEPARTMENT STORES	6	63	36	19	12	1				4	16	157
6412	GENERAL STORES	14	221	66	31	10	3					31	376
6413	OTHER GENERAL MERCHANDISE STORES	80	712	167	70	31	5	4	3	1	1	65	1 139
6511	BOOK & STATIONERY STORES	44	471	132	60	20	2	2		1	1	34	767
6521	FLORIST SHOPS	77	886	278	129	37	3		1			67	1 478
6522	LAWN & GARDEN CENTRE	10	117	56	29	10	3	1				9	235
6531	HARDWARE STORES	50	364	168	112	36	4	1				38	773

Table 1 DISTRIBUTION OF RETAIL INDUSTRIES BY SIZE OF ESTABLISHMENTS ONTARIO, 1987

sic 1	INDUSTRY DESCRIPTION	None	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500-999	1000-5000+	unknown	Total
6532	PAINT, GLASS & WALLPAPER	22	227	73	33	13	2					28	398
6540	SPORTING GOODS & BICYCLE		2	1									3
6541	SPORTING GOODS STORES	69	719	211	102	35	6		3	1		37	1 183
6542	BICYCLE SHOPS	17	83	20	11	5						10	146
6550	MUSICAL INSTR. & RECORDS		2			1						1	4
6551	MUSICAL INSTR. STORES	36	242	62	36	9	2					15	402
6552	RECORD & TAPE STORES	13	144	37	16	3	1	2	1			13	230
6561	JEWELLERY STORES	88	623	317	144	40	8	5	2		1	53	1 281
6562	WATCH & JEWELLERY REPAIR	29	167	31	19	9						10	265
6571	CAMERA & PHOTOGR. SUPPLY	15	211	76	24	13	1					21	361
6580	TOY, HOBBY, NOVELTY & SOUVENIRS	2	12	1									15
6581	TOY & HOBBY SHOPS	59	268	51	15	9	2	1				15	420
6582	GIFT, NOVELTY & SOUVENIRS	193	1 447	233	80	29	2	1				84	2 069
6590	OTHER RETAIL STORES	18	76	32	10	6	2					2	146
6591	SECOND-HAND MERCHANDISE N.E.C.	128	584	63	22	8		3	1			43	852
6592	OPTICIANS' SHOPS	23	211	85	28	13	6	2				18	386
6593	ART GALLERIES AND ARTISTS' SUPPLY	44	295	52	11	12	3					22	439
6594	LUGGAGE & LEATHER GOODS	11	105	22	11	5			1			6	161
6595	MONUMENT AND TOMBSTONE DEALERS	4	41	19	9	5						1	79
6596	PET STORES	18	251	44	16	10	2					11	352
6597	COIN & STAMP DEALERS	14	49	3	3	3						4	76
6598	MOBILE HOME DEALERS	8	37	8	9	3						6	71
6599	OTHER RETAIL N.E.C.	131	971	260	91	42	9	1	2			81	1 589
6911	VENDING MACHINE OPERATORS	29	112	49	27	17	4	6				72	316
6921	DIRECT SELLERS	60	253	70	34	27	10	3	4	—	—	41	502
	TOTAL	4,551	35,597	12,568	6,433	2,730	671	241	60	15	16	3,222	66,105
	% DISTRIBUTION BY SIZE	6.88%	53.85%	19.01%	9.73%	4.13%	1.02%	0.36%	0.09%	0.02%	0.02%	4.87%	100%

Source: Statistics Canada Business Register, Table 07, Cycle 195, Province by Employment size and sic80 Active Staticstical Establishments, 1987.

Table 2

ONTARIO RETAIL SECTOR
CONCENTRATION OF FEMALE EMPLOYMENT BY INDUSTRY DIVISION
AND SIZE OF FIRM
1983

	Total	1-4	5-19	20-49	50-99	100-499	500+
Company Count	39 095	27 145	9 368	1 683	489	321	89
Food Stores	38.4	57.6	42.9	37.9	39.1	34.8	36.0
General Merchandise	55.1	67.2	56.1	44.0	46.9	57.4	55.0
Tire, Battery & Assoc.	25.3	21.1	17.4	24.3	29.2	27.4	
Gas Service Stations	20.7	24.9	17.8	19.9		18.8	
Motor Vehicle Dealers	10.6		12.5	10.5	9.1	9.3	
Motor Vehicle Repair	11.0	11.9	10.2	10.6		6.1	
Shoe-Stores	38.9	59.1	44.1	37.2	49.7	42.6	33.1
Men's Clothing Stores	42.4	37.0	27.6	30.7	38.7	35.4	51.6
Women's Clothing Stores	82.3	86.3	79.4	76.0	80.8	80.5	86.1
Cloth Dry Goods	63.3	76.1	64.7	70.1	68.4	63.1	55.3
Hardware Stores	34.2	41.1	33.7	30.2	22.2		
Furniture & Appliances	34.2	36.4	28.0	25.3	19.2	27.3	27.7
Radio-T.V. Elec. Repair	23.6	25.3	18.5				
Drug Stores	60.1	66.8	61.2	60.8	55.2	55.8	57.4
Book Stationery	50.2	62.8	54.6	44.1	54.0	52.0	47.7
Florist Shops	66.7	77.0	63.6				
Jewellery Stores	56.0	60.0	52.2	49.0		56.1	
Watch, Jewellery Repair	35.1		33.3				
Liquor & Beer Stores	9.7						9.6
Tobacconists	64.9	65.9	52.7				
Retail Stores N.E.S.	39.4	48.3	35.6	36.2	____	37.8	____
Retail Trade	40.6	44.4	34.5	32.6	28.7	35.6	46.3

Note: Some numbers are too small to be significant and are not reflected.

Source: Calculated from Business Micodata Integration and Analysis, Statistics Canada 1983, using full year equivalents.

Table 3

PERCENTAGE DISTRIBUTION OF FEMALE EMPLOYMENT BY INDUSTRY DIVISION AND FIRM SIZE ONTARIO RETAIL SECTOR -1983

	% of Total Female Retail Employ	Size of establishment 1-4	5-19	20-49	50-99	100-499	500+
Food Stores	19.8	10.5	11.5	7.1	3.4	7.3	60.2
General Merch.	30.1	2.2	1.7	.9	.8	3.0	91.4
Tire, Batt & Acces	2.3	3.5	10.6	22.5	29.7	33.7	
Gas Service Stns	2.7	26.0	47.7	13.1		4.0	
Motor Vehicle Dlrs	1.8		22.4	27.6	25.1	18.2	
Motor Vehicle Repair	1.1	37.7	38.9	9.6		2.5	
Shoe Stores	2.1	12.4	12.5	5.9	6.0	15.9	47.2
Men's Clothing Str.	2.4	9.0	11.4	4.2	6.9	6.6	62.0
Women's Clothing Str	7.6	11.4	19.7	11.2	6.4	15.5	35.8
Cloth Dry Goods	4.2	15.3	19.6	8.7	10.2	14.3	31.8
Hardware Stores	1.4	30.0	41.0	12.9	4.2		
Furniture & Appl	4.6	19.8	22.0	10.0	3.8	12.2	9.0
Radio-TV Elec.Rep	.2	51.9	28.2				
Drug Stores	6.1	8.0	38.4	22.3	4.1	3.9	23.2
Book Stationery	1.9	10.4	15.8	10.5	1.9	12.1	49.3
Florist	1.2	39.8	47.6				
Jewellery Stores	2.2	17.0	22.5	12.0		11.2	
Watch, Jewellery Rep	.1		45.3				
Liquor & Beer Stores	.6						98.1
Tobacconists	.4	26.8	15.4				
Retail Stores nes	7.0	25.8	29.9	13.6		16.0	
% of Retail Employ.	99.8	10.9	15.6	8.0	3.8	8.3	49.4
% of Total All Industry Female Employment	15.9	17.5	21.0	15.9	9.4	8.6	16.1

Source: Business Microdata Integration and Analysis, 1983 Using FYE Stats.

Note : Variations exist between percentages in total column and distribution in firm size.
Total columns reflect total numbers employed.
Firm size reflects distribution of Full Year Equivalents only.

Table 4

AVERAGE WAGE RATES
SELECTED OCCUPATIONS-RETAIL SECTOR - ONTARIO
1985

	Industry	Union	NonUnion	Males	Females	F as % of Total # E's
Retail Food Stores						
Cashier Full Time	10.90	12.14	6.68	11.26	10.88	96.5
Cashier Part Time	7.90	8.17	5.23	6.99	8.12	80.2
Meat Cutter	13.22	13.90	10.57	13.27	8.60	1.0
Meat Packager	10.76	11.79	6.78	9.30	10.89	92.3
Receiving Clerk	12.76	13.03	8.23	12.77	11.85	1.4
Sales Clerk-Full Time	10.32	13.28	7.63	10.86	7.67	17.2
Sales Clerk Part Time	7.75	8.77	4.85	7.90	7.46	34.0
Warehouseman/woman	12.32	14.27	8.29	12.64		
Retail Trade-Other						
Cashier	6.34	11.27	5.62	13.01	5.65	90.7
Receiving Clerk	7.01	9.14	6.93	7.45	6.35	40.5
Salesperson, Class A	5.95		5.93	5.57	6.02	84.1
Salesperson, Class B	6.38		6.24	6.29	6.40	83.8
Salesperson, Class B**	8.93		9.00	9.77	7.73	41.1
Salesperson, Class C	7.60	6.61	7.64	8.31	7.18	62.5
Salesperson, Class C**	11.99		11.99	13.12	8.77	26.0
Storeman/woman	6.31		6.32	6.36	6.24	45.1
Tailor/Alterations	7.97	8.54	7.78	10.10	7.18	73.1
Truck Driver-Light	9.37		9.36	9.40		
Truck Driver-Heavy	13.63	15.09	12.44	13.63		
Warehouseman/woman	8.81	9.40	7.27	8.94	6.43	5.2

Note:
1. Class A: Salesperson requires little knowledge of merchandise sold
   Class B: Salesperson requires enough knowledge of products to assist customers in making selections
   Class C: Salesperson requires detailed knowledge of products and considerable skill in salesmanship
2. ** Commission rates

Source: 1985 Wage Rates, Salaries and Hours of Labour Ontario, Labour Canada.

Table 5

ONTARIO RETAIL SECTOR
PROPORTION OF FEMALE EMPLOYMENT
BY AGE AND FIRM SIZE
1983

	Total	1-4	5-19	20-49	50-99	100-499	500+
Company Count	39 095	27 145	9 368	1 683	489	321	89
All ages	40.3	43.4	34.4	32.7	29.6	36.1	46.2
0 - 14	38.5	38.9	33.3	26.9	21.4	42.9	62.9
15 - 24	46.6	41.7	37.3	41.4	42.2	49.7	53.8
25 - 34	35.4	36.2	28.4	28.4	25.9	34.3	41.2
35 - 44	37.8	46.9	34.0	30.6	26.3	30.9	42.2
45 - 54	43.2	51.8	40.0	33.4	27.3	32.3	49.3
55 - 64	42.9	50.9	39.3	33.0	29.1	31.2	48.4
65+	31.5	36.7	26.9	24.7	18.2	27.5	42.0

ONTARIO RETAIL SECTOR
PROPORTION OF AVERAGE EARNINGS OF FEMALES
BY AGE AND FIRM SIZE
1983

	Total	1-4	5-19	20-49	50-99	100-499	500+
All ages	70.8	78.2	73.2	66.5	57.0	61.0	72.3
0 - 14	96.1	92.5	96.8	68.5	76.9	91.4	123.0
15 -24	84.2	79.6	81.4	80.7	77.1	83.8	80.4
25 - 34	69.0	69.8	68.3	66.5	59.1	65.4	70.7
35 - 44	63.1	74.9	67.1	63.0	53.9	53.1	63.2
45 - 54	65.2	77.0	71.1	62.7	50.2	50.5	67.2
55 - 64	65.8	77.7	71.9	65.1	54.4	50.6	67.2
65+	71.3	87.8	82.8	73.9	59.6	66.0	67.6

Source: Calculated from Business Microdata Integration and Analysis, Statistics Canada, 1983.

Table 6

ONTARIO RETAIL SECTOR, PART TIME/FULL TIME
EMPLOYMENT STATUS BY AGE AND SEX
1987

(all numbers in thousands)

	Employed			
	Total	Full Time	Part Time	Part Time % of Total
1. Both Sexes				
All Ages	599	401	198	33.0
15 - 19	120	28	92	76.7
20 - 24	106	76	30	28.3
25 - 34	131	108	23	17.6
35 - 44	110	91	20	18.2
45 - 54	70	51	16	22.9
55 - 64	52	40	12	23.1
65+	11	6	5	45.4
2. Males				
All Ages	285	223	62	21.7
15 - 19	59	16	43	72.9
20 - 24	53	41	11	20.8
25 - 34	66	63		
35 - 44	50	49		
45 - 54	28	28		
55 - 64	24	22		
65+	6	4		
3. Females				
All Ages	314	178	136	43.3
15 - 19	61	12	49	80.3
20 - 24	53	35	19	35.8
25 - 34	65	45	21	32.3
35 - 44	60	42	18	30.0
45 - 54	42	26	15	35.7
55 - 64	28	18	10	35.7
65+	5			
4. Females as % of total retail				
All Ages	52.4	44.4	68.7	
15 - 19	50.8	42.9	53.2	
20 - 24	50.0	46.0	63.3	
25 - 34	49.6	41.7	91.3	
35 - 44	54.5	46.1	90.0	
45 - 54	60.0	51.1	93.8	
55 - 64	53.8	45.0	83.3	
65+	45.4			

Note: All numbers have been rounded, therefore figures may not total across.

Source: Labour Force Survey Special Tabs, Statistics Canada, Annual Averages Reference Number R87018A.

Table 7

COLLECTIVE AGREEMENTS
RETAIL 1988

	#
Part-time or Seasonal employees not specifically excluded	96
Only part-time employees specifically excluded	103
Only part-time employees specifically covered	46
Both part-time and full-time employees specifically covered	92
Other	1
Total	338

Source: Cross Tabulation - Collective Bargaining Agreements with part-time and seasonal employee coverage July 1988 (special run).

Table 8

CURRENT COLLECTIVE AGREEMENTS FOR FULL TIME AND PART-TIME EMPLOYEES
RETAIL - 1988

	Full Time				Part Time			
	# Agreements	Total Employ's	F	M	# Agreements	Total Employ's	F	M
Food Stores	30	4 908	1 865	2 923	19	9 103	4 621	4 355
Department Stores	18	1 005			15	1 568		
Variety Stores	3	295	83	212	1	24	24	
Acces. Parts, Tires & Battery	2	142		142				
Gasoline Service Stations	6	72			5	51		51
Motor Vehicle Dealers	11	301	8	293				
Motor Vehicle Repair Shops	1	6		6				
Hardware Stores	3	92						
Household, Furn. & Appl.	2	47						
Radio, T.V. and Electrical	1	40						
Drug Stores	3	20			2	14		
Book and Stationary	6	142			3	69		
Fuel Dealers	4	59						
Liquor, Wine & Beer Stores	2	31						
Retail Stores N.E.S.	11	549	81	323	1	10	____	____
Totals	103	7,709	2,037	3,899	46	10,839	4,645	4,406

Note: Male/female breakdown provided were available.

Source: Current Agreements for full time and part-time employee, Ontario Ministry of Labour, July 1988 (specia run).

Table 9

RETAIL TRADE LABOUR FORCE
BY CULTURAL CHARACTERISTICS
ONTARIO - 1981

	Male	Female
Total	256 780	270 655
Place of Birth		
- Canada	75.4	75.6
- U.S.A.	.1	1.3
- United Kingdon	4.7	6.9
- Southern Europe	6.8	5.2
- Asia	3.5	2.7
Ethnic Origin		
- British	51.5	54.5
- French	7.7	7.4
- German	4.7	5.0
- Italian	7.6	6.4
- Ukranian	1.6	1.9
- Dutch	2.4	2.3
- Native People	.5	.4
- Other	16.3	14.1
- British & French	2.1	2.2
- British & Other	3.6	3.8
- French & Other	.5	.5
- Other Multiple Origin	1.5	1.5

Source: Statistics Canada, Cat. 92-922, 1981 and special calculations.

Table 10

RETAIL TRADE - CHAIN AND INDEPENDENT STORES
INCREASE IN TOTAL SALES 1987/1973

	Increase in Total Sales 1987/1973
Combination (Grocery & Meat)	3.56
Grocery, confect, & sundry	5.11
All other food stores	2.81
Department stores	3.13
General merchandise	3.87
General stores	1.93
Variety stores	1.13
Motor vehicle dealers	5.03
Used car dealers	6.77
Service stations	4.33
Garages	3.85
Automotive parts & acces.	4.48
Men's clothing stores	2.49
Women's clothing stores	5.14
Family clothing stores	3.67
Specialty shoe stores	8.20
Family shoe stores	2.91
Hardware stores	3.25
Household furniture stores	3.09
Household appliance stores	3.35
Furniture, T.V. radio & appliance	3.65
Pharmacies, patent medicine & cosmetics	5.55
Book and stationery stores	4.61
Florists	3.65
Jewellery stores	3.47
Sporting goods & acces.	6.95
Personal acces. stores	4.36
All other stores	3.61
ALL STORES	4.07

Table 10 RETAIL TRADE - CHAIN AND INDEPENDENT STORES BY KIND OF BUSINESS - ONTARIO - 1987

sales in '000's

	Chain	Independent	All Stores	Chains % of Total
Combination (Grocery & Meat)	6 964 416	2 979 666	9 944 078	35.6
Grocery, confect, & sundry	1 412 617	1 187 237	2 599 850	54.3
All other food stores	126 613	875 355	1 001 968	12.6
Department stores	5 205 764		5 205 764	100.0
General merchandise	1 115 296	359 879	1 475 173	75.6
General stores			228 463	
Variety stores	242 626	50 561	293 187	82.8
Motor vehicle dealers		12 930 303	12 930 303	
Used car dealers		328 229	328 229	
Service stations	1 540 193	2 828 676	4 368 866	35.2
Garages		583 222	644 806	
Auto.parts & access.	25 034	970 289	1 592 443	1.6
Men's clothing stores	379 088	276 545	655 633	57.8
Women's clothing stores	871 770	379 072	1 251 202	69.7
Family clothing stores	464 651	144 674	609 323	76.3
Specialty shoe stores	64 718	44 712	109 432	59.1
Family shoe stores	327 956	125 724	453 678	72.2
Hardware stores			460 748	
Household furniture str.	207 227	607 784	815 010	25.4
Household appliance stores	61 340	233 002	294 341	20.8
Furniture, T.V. radio & appl.	416 794	131 187	547 984	76.1
Pharm.,patent med & cosmetics	813 889	1 793 154	2 607 039	31.2
Book and stationery stores	214 557	154 361	368 918	58.2
Florists	14 142	248 953	263 093	
Jewellery stores	240 808	236 406	477 215	50.5
Sporting goods & access.	230 756	568 733	799 490	
Personal access. stores	471 454	658 697	1 130 152	41.7
All other stores	4 238 048	3 378 494	7 616 541	55.6
TOTAL RETAIL SALES	25 795 851	33 224 811	59 072 931	43.7

Table 10 RETAIL TRADE - CHAIN AND INDEPENDENT STORES BY KIND OF BUSINESS - ONTARIO - 1979

sales in '000's

	Chain	Independent	All Stores	Chains % of Total
Combination (Grocery & Meat)	4 564 699	1 139 729	5 704 428	80.0
Grocery, confect, & sundry	411 112	633 844	1 044 956	39.3
All other food stores	65 080	402 659	467 739	13.9
Department stores	3 085 155		3 085 155	100.0
General merchandise	446 366	88 036	534 402	83.5
General stores			173 344	
Variety stores	246 390	58 611	305 001	80.8
Motor vehicle dealers		5 050 280	5 050 280	
Used car dealers		119 351	119 351	
Service stations	508 091	1 517 242	2 025 333	25.1
Garages		332 005	332 005	
Auto.parts & access.	71 895	607 118	679 013	10.6
Men's clothing stores	151 758	198 200	349 958	43.4
Women's clothing stores	298 238	249 717	547 955	54.4
Family clothing stores	198 829	153 752	352 581	56.4
Specialty shoe stores	19 487	22 624	42 111	46.3
Family shoe stores	175 057	78 674	253 731	69.0
Hardware stores			199 148	
Household furniture str.	92 486	315 358	407 844	22.7
Household appliance stores			102 128	
Furn., T.V., radio & appliance	29 800	89 881	119 681	24.9
Pharmacies, patent medicine & cosm.	243 849	689 399	933 248	26.1
Book and stationery stores	94 793	64 943	159 636	59.4
Florists			120 973	
Jewellery stores	124 665	135 739	260 404	47.9
Sporting goods & access			299 765	
Personal acces. stores	149 414	234 818	384 232	38.9
All other stores	1 986 641	1 474 138	3 460 779	57.4
ALL RETAIL	13 101 179	14 414 102	27 515 281	47.6

Table 10 RETAIL TRADE - CHAIN AND INDEPENDENT STORES BY KIND OF BUSINESS - ONTARIO - 1973

sales in '000's

	Chain	Independent	All Stores	Chains % of Total
Combination (Grocery & Meat)	2 186 740	606 411	2 792 151	78. 3
Grocery, confect, & sundry	147 946	361 213	509 159	29.0
All other food stores	40 114	316 399	356 513	11.3
Department stores	1 649 868		1 649 868	100.0
General merchandise	329 160	52 089	381 249	86.3
General stores			118 215	
Variety stores	208 760	50 096	258 856	80.6
Motor vehicle dealers		2 568 251	2 568 251	
Used car dealers		48 415	48 415	
Service stations	182 945	825 446	1 008 391	18.1
Garages		167 560	167 560	
Automotive parts & access.	45 120	310 107	355 227	12.7
Men's clothing stores	78 185	184 949	263 134	29.7
Women's clothing stores	113 756	129 585	243 341	46.7
Family clothing stores	58 919	107 322	166 241	35.4
Specialty shoe stores	5 567	7 783	13 349	41.7
Family shoe stores	83 960	72 127	156 087	53.8
Hardware stores			141 927	
Household furniture stores	65 103	198 741	263 844	24.7
Household appliance stores			87 907	
Furn.,T.V., radio & appliance	77 844	72 188	150 032	51.9
Pharmacies, patent medicine & cosm.	123 995	345 844	469 839	26.4
Book and stationery stores	39 357	40 575	79 932	49.2
Florists			72 104	
Jewellery stores	65 587	71 904	137 491	47.7
Sporting goods & access			114,958	
Personal access.	72 796	186 304	259 100	28.1
All other stores	1 167 551	939 065	2 106 616	55.4
ALL STORES	6 609 687	7 895 549	14 505 236	45.6

Table 11

SUMMARY OF RETAIL CHAINS*
BY NUMBER OF OUTLETS
ONTARIO - 1988

	Number of outlets in the chain					
	100+	50-99	20-49	10-19	5-9	4 or Less
Ladies Wear	13	5	19	19	28	33
Furniture	2	4	8	13	23	32
Footwear/Leather	6	6	13	14	19	21
Spec.Food & Drink	5	5	13	13	14	23
Automotive	14	12	8	4	9	19
Unisex Ladies/Men	4	3	12	9	8	10
Home Appl/Video	4	4	8	4	8	8
Optical	1	2	9	5	8	9
Jewel/Fashion Acc	2	3	4	7	3	14
Dept/Mass Merch.	9	8	5	2	4	2
Men's Wear	3	2	2	3	12	7
Drug/Health/Beauty	7	3	1	5	3	8
Sporting Goods	2	1	1	3	10	9
Florist/Nursery		1	1	3	9	11
Grocery	6	5	1	2	5	6
Family Apparel	1	3	2	5	10	3
Gift			4	2	5	13
Computers/Electr.		3		2	6	12
Hardware/Pnt/Pap	6	2	5	3	4	2
Variety/Conven.	5	3	4	4	2	4
Building Suppl.	3	1	1	1	7	4
Photo/Camera	5	1	1	2	2	4
Books	1				4	9
Fabric/Draper			2	4	2	4
Hobby/Craft	1	3		3	1	3
Stationery	1	1	2	1	3	3
Music/Rec/Tapes	2	1	4	1	2	1
Children's Wear		1	4	2	1	2
Cosmetics/Toilet.	2	1	1		1	5
Toys			1	4	2	3
Pets		1	3	1	2	1
Housewares		1	2		2	
Total in category	105	86	141	141	219	285

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* Excludes those which fall into more than one category.

Source: 1988 Directory of Retail Chains in Canada. Monday Report on Retailers

Table 12

EMPLOYMENT CREATION BY INDUSTRY CLASSIFICATION AND FIRM SIZE
RETAIL
1978 & 1983

	1978				1983			
	Firms	Continuous	Births	Deaths	Firms	Continuous	Births	Deaths
Food Stores	5 250	2 683	0	2 567	5 713	2 683	3 030	0
0 - 19	4 860	2 435	0	2 425	5 397	2 435	2 962	0
20 - 99	330	207	0	123	272	207	65	0
100+	60	41	0	19	44	41	3	0
General Merchandise	1 874	953	0	921	1 586	953	633	0
0 - 19	1 693	862	0	831	1 492	862	630	0
20 - 99	111	57	0	54	60	57	3	0
100+	70	34	-	36	34	34	-	0
Tire, Battery & Acces.	950	572	0	378	853	572	281	0
0 - 19	666	390	0	276	643	390	253	0
20 - 99	255	162	0	93	186	162	24	0
100+	29	20	0	9	24	20	4	0
Gasoline Service Stn.	5 230	2 575	0	2 655	4 067	2 575	1 492	0
0 - 19	5 057	2 471	0	2 586	3 927	2 471	1 456	0
20 - 99	163	97	0	66	131	97	34	0
100+	10	7	0	3	9	7	2	0
Motor Vehicle Dealers	2 328	1 287	0	1 051	1 790	1 287	503	0
0 - 19	1 503	829	0	674	1 236	829	407	0
20 - 99	697	397	0	300	477	397	80	0
100+	138	61	0	77	77	61	16	0
Motor Vehicle Repair	4 681	2 725	0	1 956	4 988	2 725	2 563	0
0 - 19	4 566	2 646	0	1 920	4 895	2 646	2 249	0
20 - 99	107	74	0	33	88	74	14	0
100+	8	5	-	3	5	5	-	0

	1978				1983			
	Firms	Continuous	Births	Deaths	Firms	Continuous	Births	Deaths
Shoe Stores	629	400	-	229	619	400	219	0
0 - 19	568	359	-	209	569	359	210	0
20 - 99	38	24	-	14	33	24	9	0
100+	23	17	-	6	17	17	-	0
Men's Clothing Stores	1 103	631	0	472	867	631	236	0
0 - 19	1 032	588	0	444	814	588	226	0
20 - 99	57	35	0	22	41	35	6	0
100+	14	8	0	6	12	8	4	0
Women's Clothing Stores	1 698	941	0	757	1 565	941	624	0
0 - 19	1 528	831	0	697	1 438	831	607	0
20 - 99	133	87	0	46	103	87	16	0
100+	37	23	0	14	24	23	1	0
Clothing & Dry Goods N.E.S.	1 501	796	0	705	1 393	796	597	0
0 - 19	1 370	723	0	647	1 311	723	588	0
20 - 99	102	58	0	44	66	58	8	0
100+	29	15	0	14	16	15	1	0
Hardware Stores	1 412	884	0	528	1 320	884	436	0
0 - 19	1 357	841	0	516	1 264	841	423	0
20 - 99	50	39	0	11	52	39	13	0
100+	5	4	-	1	4	4	-	0
Household Furn. & Appl.	3 896	2 028	0	1 868	3 817	2 028	1 789	0
0 - 19	3 673	1 895	0	1 778	3 646	1 895	1 751	0
20 - 99	192	111	0	81	144	111	33	0
100+	31	22	0	9	27	22	5	0
Radio, T.V. & Elec. Appl.	469	298	0	171	542	298	244	0
0 - 19	462	292	0	170	535	292	243	0
20 - 99	7	6	0	1	7	6	1	0
100+	-	-	-	-	-	-	-	-

	1978				1983			
	Firms	Continuous	Births	Deaths	Firms	Continuous	Births	Deaths
Drug Stores	1 469	1 018	0	451	1 491	1 018	473	-
0 - 19	1 282	900	0	382	1 328	900	428	-
20 - 99	166	110	0	56	155	110	45	0
100+	21	8	-	13	8	8	-	0
Book & Stationery Stores	515	296	0	219	502	296	206	0
0 - 19	464	263	0	201	464	263	201	0
20 - 99	40	26	0	14	31	26	5	0
100+	11	7	-	4	7	7	-	0
Jewellery Stores	838	570	0	268	836	570	266	0
0 - 19	778	528	0	250	788	528	260	0
20 - 99	50	36	0	14	41	36	5	0
100+	10	6	0	4	7	6	1	0
Watch & Jewellery Repair	89	59	0	30	119	59	60	0
0 - 19	86	57	0	29	116	57	59	0
20 - 99	3	2	0	1	3	2	1	0
100+	-	-	-	-	-	-	-	-
Liquor, Wine & Beer	20	6	0	14	13	6	7	0
0 - 19	10	3	0	7	9	3	6	0
20 - 99	0	-	0	-	1	-	1	-
100+	10	3	-	7	3	3	-	0
Tobacconists	197	110	0	87	183	110	73	0
0 - 19	192	107	0	85	180	107	73	0
20 - 99	3	2	-	1	2	2	-	0
100+	2	1	-	1	1	1	-	0
Retail Stores N.E.S.	5 997	3 220	0	2 777	5 990	3 220	2 770	0
0 - 19	5 654	3 008	0	2 646	5 745	3 008	2 737	0
20 - 99	305	187	0	118	215	187	28	0
100+	38	25	0	13	30	25	5	0

Source: Employment Creation by Industry Classification, firm size life Status, 1978-83 (Ontario).

Table 13

ONTARIO RETAIL SECTOR BY BUSINESS SIZE
AND AVERAGE LABOUR UNITS
1978 & 1985

	1978		1985		% Change	
	Businesses	Avg. Labour Units	Businesses	Avg. Labour Units	Bus.	Avg. Labour Units
Total-All Sizes	37 498	437.2	45 360	537.8	+21.0	+23.0
Less than 5	25 815	42.4	33 200	89.5	+28.6	+111.1
5 - 19	9 199	83.0	9 728	100.5	+5.7	+21.1
20 - 49	1 619	44.7	1 628	53.8	+5.5	+20.3
50 - 99	478	29.6	449	34.1	(-6.0)	+15.2
100 - 499	303	40.8	285	47.0	(-5.9)	+15.2
500+	84	196.7	70	212.9	(-16.7)	+8.2

Note: Average Labour Units are calculated by dividing annual payroll by an estimate of average annual earnings to reflect annual mix of workers.

Source: Business Microdata Integration and Analysis and Small Business Statistics, Statistics Canada, July 1987.